# U.S. Environmental Protection Agency

# Office of Environmental Information

# How-to Help Desk

# Attachment 1 - Statement of Work

# 3/7/2014

## *Overview*

This Task Order falls under the IT Policy and Training Branch (ITPTB), Mission Investment Solutions Division (MISD), Office of Technology Operations and Planning (OTOP), Office of Environmental Information (OEI).

The Environmental Protection Agency (EPA) is in the process of migrating all staff in EPA locations around the country from Windows XP/Office 2007 to Windows 7/Office 2013 and Office 365. The migration began in fall 2013 and is expected to be finalized to over 20,000 computer users by May 2014.

EPA also is moving to cloud-based SharePoint 2013 services -- a completely new tool for the Agency. While EPA has a number of employees already participating in early adoption trials in SharePoint, the full launch of SharePoint Agency-wide will coincide with the completion of the Windows 7/Office 2013 migration in May 2014.

EPA currently maintains a Break-fix Help Desk to assist employees when their computers and applications do not work as expected. We anticipate a sharp rise in functionality or “how-to” questions as staff begins to use these upgraded tools, and thus have identified the need for a separate How-to Help Desk. In addition, we expect that using this service will help our users adopt new technology and integrate it into their daily work.

The Contractor shall provide knowledge support to computer users in the Environmental Protection Agency (EPA) for many commercial off the shelf (COTS) applications such as Microsoft Word, Excel, and SharePoint. The "common core" software we seek how-to support for is listed in Appendix A. The Contractor shall also provide how-to support to approximately 200 EPA employees who use assistive technology to access COTS software. EPA's assistive technology software is listed in Appendix A. We anticipate 1,000 – 1,500 calls/month to the How-to Help Desk.

### *Objectives*

1) The Contractor shall provide expert support to answer questions from technical and non-technical EPA computer users about how to use specific commercial off-the-shelf (COTS) software applications (Appendix A) to do their work. This includes:
    a. Support new versions of the listed software as they are released.
    b. Describe what features are available in a particular COTS application.
    c. Explain how to use the features of a particular COTS product.
    d. Assist the customer in using those features to the customer’s satisfaction.
    e. NOTE: The Contractor shall not perform tasks for any caller, but shall provide callers with solutions that will permit the caller to complete the task him or

herself. For example, the contractor shall describe how to reformat a document, but shall not reformat the document for the caller.

2) It is an objective of this program that the Contractor define, as a minimum:

   a. **Establishment**: Use of the best commercial practices to establish a How-To Help Desk accessible to users through EPA's Call Center telephone number during regular business hours for all EPA locations. Establish an incident tracking system for tracking and measuring the number and type of calls. The service provider can propose a tracking mechanism which may include the existing break-fix Remedy helpdesk system.

   b. **Coordination**: Work with the current EPA break-fix help desks to establish a process to coordinate calls between the break-fix help desks and the how-to help desk -- to direct appropriately any break-fix calls that come to the how-to help desk, and vice versa.

   c. **Ongoing User Support:** Establish and maintain a knowledge base or information repository on a publicly available website where users can find information like: common software tips and tricks, news and announcements, Quick Reference Guides (QRGs), and/or frequently asked questions (FAQs).

   d. **Flexibility**: Provide flexibility to adapt to contingencies resulting from changing user demand and workload requirements.

   e. **Capacity**: Perform helpdesk center capacity monitoring and planning to monitor and maintain appropriate staffing levels for anticipated and planned call volumes.

   f. **Metrics**: Establish a baseline of the number and types of user inquiries. Regularly report the changes to that information, so that the adoption of technology across EPA can be inferred from the lessening number of user calls on specific topics. (See Appendix C for a sample.)

   g. **Quality Control:** Develop and maintain a quality standard and program to ensure the How-to Help Desk answers are accurate, timely, and helpful to EPA users. Develop and implement procedures to ensure appropriate corrective action to deal with complaints and when the quality is not up to the standard.

   h. **Logistics**: Plan for developing and delivering reports and metrics to support MISD in identifying issues that need to be further addressed in EPA-specific training courses that MISD develops.

### *Specific Requirements*

See Appendix B, the Quality Action Plan (QAP), for additional information about incentives and acceptable quality standards.

1) Contractor shall provide support from 7:00 AM to 9:00 PM, EST, Monday through Friday, excluding federal holidays. Contractor will be available via telephone through a menu setting on EPA's Call Center.
2) Contractor shall answer 95% of all calls within 30 seconds.

3) Contractor shall resolve 95% of all calls within 1 day and 99% of calls within 3 days.
4) The help desk shall be adequately staffed, with a sufficient number of incoming lines to handle potential on-demand surges during Agency-wide migrations of new technology.
5) Personnel answering telephones shall be courteous and shall accurately and efficiently log in all incoming calls.
6) Contractor shall provide end-user assistance via remote control using Bomgar Remote Workforce software.
7) Contractor shall be a Microsoft Preferred Services Partner in order to be able to effectively support EPA staff using Microsoft technologies listed in appendix A.
8) Contractor shall provide customized escalation procedures tailored to EPA standard support processes. Contractor to help develop an Operating Level Agreement document with existing EPA Help Desks to ensure that incident tickets are processed in a timely and accurate manner, identify the difference between a knowledge question and a problem / incident so that EPA Help Desks can let the customer know of an estimated time to complete, ensure that knowledge is shared with the EPA Help Desks in order to expedite issue resolution and document all interactions with EPA Help Desks.

## Schedule of Deliverables

| Deliverable | | Schedule |
|---|---|---|
| **Product Group Summary Report** | Shows number of call events per application, total costs per application, total costs overall, and total contract funding remaining | By fifth workday of each month |
| **Call Detail Report** | Lists, on a call-by-call basis, the name of the customer, the date of the call, the solutions provided. (Excel comma delimited file format or.CSV format) | By fifth workday of each month |
| **Quality Assurance Management Report** | Addresses key service criteria, as well as service level metrics including speed to answer, abandonment rate, and first-contact resolution rate. | By fifth workday of each month |

## Key Personnel

Contractor shall demonstrate the ability to provide qualified and experienced personnel for implementing the services proposed. Contractor key personnel proposed must include at a minimum a Program Manager, a Microsoft SharePoint Certified or subject matter expert, and a Microsoft Office Certified or subject matter expert.

The Contractor key personnel are expected to be dedicated to this effort and be available for the majority of the time. For each proposed key person, a resume is required. Additional resumes of non dedicated staff members necessary to implement the services proposed must also be included. All key personnel shall be full-time employees of the prime Offeror or a subcontractor team member at the time of contract award or the Offeror shall provide a letter of commitment signed by the individual and Offeror.

## Attachments

Appendix A – List of COTS applications and list of assistive technology applications to be supported by the Contractor
Appendix B – Quality Action Plan (QAP)

## STRATEGIC PERFORMANCE METRIC PARAMETERS

Describe process monitoring and measurement activities to affect the desired outcomes for the following Tasks.

1. Project related activities are identified, planned, and communicated to provide transparency into work being performed in a measurable way.
2. A process is established and maintained to coordinate customer calls between the break-fix help desk and the how-to help desk in a smooth and seamless manner, with a minimum of disruption to the customer.
3. Customer calls are answered in a timely manner.
4. Customer calls are resolved to the customer's satisfaction.
5. A process is established for incorporating lessons learned into future customer interactions.
6. Increase ability to identify data trends that may be helpful in the accomplishment of OEI objectives.
7. Increase customer satisfaction through increased awareness of planned and unplanned call volumes, and other events that impact resource availability.
8. User satisfaction with system is evaluated to determine areas for improvement.

# Appendix A: Software to be Covered by Contractor Support

## EPA "Common Core" Software Offerings

- Microsoft Office 2013 (client) and Microsoft Office 365
    - Microsoft Word
    - Microsoft PowerPoint
    - Microsoft Excel
    - Microsoft Access
    - Microsoft Publisher
    - Microsoft Outlook
    - Microsoft OneNote
    - Microsoft SharePoint
    - Microsoft Lync
- Microsoft Internet Explorer 9
- Windows 7

## EPA Assistive Technology Software

- Jaws for Windows Professional version 13 and above
- Dragon Naturally Speaking Professional version 11
- Zoomtext version 10

This list is not meant to be inclusive of all COTS applications used by EPA staff. However, it represents the core COTS applications that are to be supported by the contractor

# Appendix B: Quality Action Plan (QAP)

| Desired Outcomes | Required Service | Performance Standard | Acceptable Quality Level (AQL | Monitoring Method | Disincentives for not Meeting the Performance Standards |
|---|---|---|---|---|---|
| Customers calling the help desk shall be able to contact a support staff member from 7:00 am to 9:00 pm, EST, M-F. | The help desk shall be adequately staffed, with a sufficient number of incoming lines to handle potential trouble calls | 95% of calls are answered on the customer's first attempt. | 98% of calls are answered on the customer's first attempt. | Survey customers and evaluate feedback. Inspect call logs. (Trend analysis) | 0.5% of the monthly invoice |
| Calls are answered promptly by help desk personnel. | The help desk shall be adequately staffed, with a sufficient number of incoming lines to handle potential trouble calls. | 95% of calls are answered within 30 seconds or a voice mail can be left; calls shall be returned within one hour of receipt. | 98% of calls are answered within 1 minute or a voice mail can be left. Calls shall be returned within 30 mins. For L1 customers and 60 mins for L2 customers. | Random sampling of Quality Assurance Management Reports. Random surveillance of actual operations. (Trend analysis) | 0.75% of the monthly invoice |
| Time to resolve customer problem or answer question is as short as possible. | Time to resolve problems/ answer questions is within the time frames set forth in the SOW or in the Service Level Agreement (SLA). | 95% of calls received are resolved within 1 business day. | 99% of calls received are resolved within 3 business days. | Random sampling of Call Detail Reports (Trend analysis) | 1% of the monthly invoice |